



Resource Guide for Single Pastor Families

NOTE: An electronic version of this document and all hyperlinks are available at <https://journeyoffaith.org/parish-resources/> or use your phone to scan:



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Appendices & Hyperlinks

Appendices

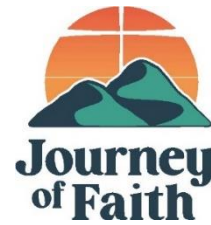
- A. Family Leadership Team
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Hyperlinks

- [Archdiocesan Core Repertoire](#)
- [Sample Family Parish Council Guidelines](#)
- [Norms for Parish Finance Councils](#)
- [How to Create a Job Description](#)
- [Fair Labor Standards Act \(FLSA\) Guide](#)
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- [Cyber Security Resource Document](#)
- [IT Hardware Standards Resource Document](#)
- [School Governance and Finance Models](#)
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10 February 2023

Subject: Resource Guide for Single Pastor Families



Esteemed Priests: Curia staff members have created this Resource Guide to help you address the many unique challenges that are likely to come with shepherding multiple parishes. As you begin to move forward with centralizing administration and ministry, I invite you to consult the various topics in this guide, ranging from communication best practices to suggested guidelines for liturgy, staffing, and IT. There are also suggested tips for managing sacramental records, Safe Environment, and schools, along with some ideas on what collaborative leadership may look like in a single pastor family.

Please consult the topics you're interested in. Mostly this guide offers recommendations, but where there are required actions they are clearly labeled as such.

Most topics are covered in a page or so, with appendices, hotlinks, and curia points of contact in case you'd like to go deeper. One of the concluding appendices briefly summarizes the process for parish mergers and another offers considerations for sites that are ceasing Sunday-obligation Mass. Among the hotlinks you'll find suggested job descriptions for required staff positions along with a few optional ones.

Please consider this document to be an entryway into sustained and integrated support from the curia as we continue on our journey to align parish structures with available resources for the sake of the mission of Christ Jesus.

Thank you for all you're doing on our Journey of Faith. We continue to welcome your feedback on ways the curia can support you.

Peace,

Phil LaSala

Director of Pastoral Planning

TOPIC 1 – COMMUNICATIONS RECOMMENDATIONS

Guiding Principle for Communication: Speak with one voice for all in the family of parishes.

COMMUNICATIONS CONSIDERATIONS	OPTIONS/SUGGESTIONS
Introduction of pastor(s)/clergy/staff to newly established parish family members	<ol style="list-style-type: none"> 1. Letter from pastor(s) 2. A short video to be played after Masses on a single weekend 3. Social gathering 4. A factsheet that addresses anticipated questions that can be used as a bulletin insert or emailed/mailed to parishioners
Branding	Develop a unique name and logo for the parish family to be used on all communication materials
Bulletins	Combine parish bulletins into a single bulletin
Email/text messages	<ol style="list-style-type: none"> 1. <i>Flocknote</i> is the preferred email software for communication with parishioners. For assistance: <ul style="list-style-type: none"> • help@flocknote.com or • Contact Amy Weindel at aaweindel@archomaha.org 2. Use tailored addressee lists to avoid information overload, e.g., certain parish ministries only, men only, RE parents 3. Send weekly or bi-weekly emails to all members of the parish family to promote information sharing
Social media	<p>Create combined social media sites for the family (recommended) or maintain separate social media accounts for each parish.</p> <ul style="list-style-type: none"> • Create a consistent look, feel, and tone across all social media channels • Like and share content between independent channels
Website	<p>Create a single website</p> <ul style="list-style-type: none"> • Confirm who will be responsible for content and upkeep • Include a tab for each parish in the family that could include blog posts or information relevant information to that parish • Website IT considerations <ul style="list-style-type: none"> ○ Hosting can be provided at no charge through WPEngine.com under the Archdiocese virtual environment; the site must be WordPress based ○ 3rd party hosting services should be provided by a reliable service that will not interject adds/collect/distribute visitor information to pay for hosting services ○ Hosting services should automatically patch/update/backup all sites and maintain security best practices ○ <i>Recommended Products: WordPress on WPEngine.com</i>

Communication Services & Consultation Provided by Archdiocese. Contact Deacon Tim McNeil for details.

Editorial calendars

Content creation

- social media
- email
- scriptwriting
- speechwriting
- website design

Creative/Art direction

Publication production

- Copywriting
- Photography

Video production

Podcast production

Message development, e.g., talking points, backgrounders, fact sheets, FAQs

Media relations, news releases and alerts

TOPIC 2 – SACRED LITURGY: RECOMMENDED STEPS

Preface: Acknowledge Grief - Public, liturgical acknowledgement includes preaching, general intercessions, and holy hours that memorialize a new chapter in the life of a community.

- 1. All parish initiatives should support a growing awareness of Sunday Eucharist as the source and summit (required).** Ministry leaders can concretely evaluate how every parish activity relates to their assembly at Mass on the Lord's Day.
- 2. Define and commit to an ongoing pursuit of liturgical excellence (required).**
 - Evaluate strengths and opportunities to improve liturgical practices at Sunday Mass that are dignified, suitable, and workable based on available local resources.
 - Create formation opportunities for liturgical ministers; the Office of Worship can provide a "crash course"¹ on the Church's liturgical vision to supplement experiences of local leaders.
 - Preserve the uninterrupted flow of the liturgy--reserve announcements, presentations, and awards for non-liturgical time or place these at the end of Mass if necessary.
 - Hire competent liturgy/music staff--full time, part time, or shared between parishes. Otherwise, place committed volunteers who are well-formed or receptive to formation in leadership roles.
- 3. Create efficiencies and build on common ground between communities by unifying liturgical practice across Sunday Masses in a parish family (recommended).**
 - Implement the same liturgical music at Masses on a given day/feast.
 - Establish a common set of expectations for all liturgical minister, e.g., dress/attire, arrival time, pre-Mass preparations, and sanctuary etiquette.
 - Use tools such as Ministry Scheduler Pro to coordinate parish family ministry scheduling.
- 4. Prioritize the voice and consider consolidating liturgical ministries (recommended).**
 - The voice is the primary instrument for worship in the Catholic liturgical tradition, and *a cappella* singing is suitable if no keyboardist is available. In that case, music selection should be conducive to vocals without instrumental support. Click on [Archdiocesan Core Repertoire](#) for a good starting place for appropriate tunes and texts.
 - Voices singing together, i.e., the choir or assembly, are preferable to solo singing.
 - It is better to have a solid choir on occasion, e.g., once a month, than an inconsistent ensemble on a more regular basis. Consider combining dwindling ensembles or replacing a choir with committed cantors. A properly trained cantor needs no more musical talent than a committed choral singer and can ably lead a liturgy with or without instrumental support. If they are capable of vocally cueing the assembly to sing the appropriate liturgical music that has been planned, then they are prepared for service.
 - Prioritize keyboard competency over other instruments. Keyboards lead rather than accompany because they uniquely provide melody, harmony, and rhythm to support singing.
- 5. Set high standards for youth liturgies (recommended).** Students performing ministerial functions should be well prepared, and leadership roles, e.g., readers, cantor, and psalmist, should be reserved for older grades to provide a good example for younger students.
- 6. Seek support (recommended).** Direct liturgical and musical questions to Dr. Michael Emmerich or Dr. Marie Rubis Bauer. Other offices will be consulted as needed, such as HR or Catholic Schools.

¹ Examples of valuable liturgical documents are the Liturgical Constitution, GIRM, and *Sing to the Lord*.

**TOPIC 3 – SACRAMENTAL RECORDS
AND SACRAMENTAL DATA REQUIREMENTS**

1. Sacramental Records

- All parishes' sacramental registers should be kept at the centralized administration office for the family.
- Sacraments of baptism, first communion, confirmation, and marriage are to be recorded in the parochial register *of the parish* where the sacrament occurred, even for non-parishioners.

2. Archdiocesan Pastoral Report for Parishes with Joint Programs and/or Joint Sacraments

- Parishioners should only be counted by their assigned parish on the archdiocesan pastoral report (e.g., Children from Parish A and Parish B are both confirmed at Parish B. Parish A should record their confirmed children on the Pastoral Report. Parish B should record their confirmed children on the Pastoral Report).
- This parish distinction does not apply to Mass attendance counts, which reflect the total number of attendees at a particular place and time.

For questions, contact the Vice Chancellor, Elizabeth Sondag.

TOPIC 4 – COLLABORATIVE LEADERSHIP OVERVIEW

1. Clergy Team. This includes all active priests and deacons serving in a parish or family of parishes. The pastor regularly convenes the clergy team to build fraternity, promote a common sense of mission focused on the Big Goal, and to coordinate clerical life. Insofar as each priest and deacon is missioned by the archbishop to a family of parishes, each with a distinct role, it will be for the clergy team to arrange their common duties in ways that allow each priest and deacon opportunities for full and robust pastoral ministry.

2. Family Leadership Team.² Comprised of 4-6 people, including the pastor, who meet regularly (weekly is ideal) to help the pastor advance his vision for a parish or Family of Parishes. The pastor relies on this team to help him make and implement decisions that will help the parish or Family of Parishes become missional communities.

- **How is a family leadership team helpful?** A leadership team helps a pastor engage a parish or Family of Parishes in a process of parish renewal for the sake of mission, and its members share the pastor's vision and passion. The pastor alone cannot change parish culture, nor is it advisable to make big decisions without constructive feedback. The team offers the collective support and gifts of its members. Whether he has paid parish staff or not, a leadership team shares ownership and accountability for the vision and plans for evangelization.
- **What does a family leadership team do?** *The team assists the pastor with the coordination and execution of the vision.* A leadership team addresses practical, tactical questions related to structures, approaches to ministry, programming, use of resources, etc. Every meeting should end with clarity about: 1) What did we decide today? 2) Who needs to know about it?

See **Appendix A** for how to form a Leadership Team and a suggested agenda for a Family Leadership Team.

3. Parish Pastoral Council and Family of Parishes Pastoral Council. Pastoral Councils and their diverse membership will give energy to the Big Goal that every parish will become a missional community by 2026.

Role of Parish Pastoral Council

Before Families of Parishes can consider a new visioning body, it is important to understand the role and responsibilities of a parish pastoral council to:

- assist the pastor in the discernment and proposal of a vision and direction for parish life
- provide for the spiritual growth of its members
- provide consultation to the pastor on pastoral planning matters
- engage in parish renewal through developing parish goals
- listen to and represent the wisdom of many perspectives
- calls forth the gifts of individuals and groups in the faith community
- cooperate with other parishes in fulfillment of the broader mission of the church

² Adapted from "Forming a Leadership Team," available on the ArchOmaha Equip website at <https://equip.archomaha.org/wp-content/uploads/2020/10/Forming-a-Leadership-Team.pdf>.

Additional Recommendations for Family of Parishes Pastoral Council

- Suppress existing parish pastoral councils in the family of parishes and establish a unified Family of Parishes Pastoral Council.
- Decide how members will be selected, e.g., election or pastor appointment.
- Every parish in the family should have equitable representation based on the number of parishes in the family and the relative size of each parish. There should be approximately 12 total members.
- Identify additional *ex officio* members. Some possibilities: finance council chair, school principal, trustee, assistant pastor, and/or leadership team members.
- Determine election or appointment date.
- Establish a regular meeting schedule. Initial meetings can be used for orientation and voting on president, vice president and secretary. It is recommended these officers be from different parishes.

Click on [Family Pastoral Council Guidelines Template](#) for details.

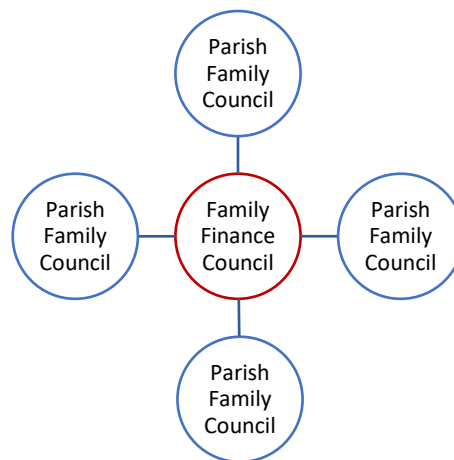
4. Parish Finance Council and Family Finance Council

Best Practices

- It is recommended that the pastor attend the meetings, have uniform financial reports, and stagger the meetings. For example, hold quarterly Family Finance Council meeting and biannual Parish Finance Council meetings.
- If there are multiple investment accounts, create one investment committee for all parishes in that family (recommended). The Finance Council could also serve in that capacity. Also, consider working with one investment manager to simplify the process.

Family Finance Council (optional). A Family Finance Council should include two members from each parish in the family, and can provide consultation to the pastor on financial matters and financial policies that affect more than one parish in the family, e.g., common benefits, shared expenses, maintenance, and business operations. It also can assist the pastor with financial accountability, compliance, and promote collaboration amongst the parishes.

Figure 1: Family Finance Council Structure



Parish Finance Council (required): Separate Parish Finance Councils for each parish are still required even if there is a Family Finance Council.

- Only the Parish Finance Council can vote on the annual parish budget, acts of extraordinary administration, and acts of major importance. For details, click on [Norms for Parish Finance Councils](#).
 - Examples of acts of extraordinary administration are commitments of parish resources \$75,000 and above, sale of religious artifacts that would be considered part of the parish's patrimony and conducting a parish campaign.
 - Examples of acts of major importance are purchasing a parish vehicle, replacing all hymnals/missals in the church, and remodeling rooms.
- NOTE: A person can serve on multiple parish finance councils.

TOPIC 5 - STAFFING

1. Obligatory Parish/Family Staff or Volunteer

- *Evangelization Coordinator*: All families of parishes must have a designated evangelization coordinator who assists the pastor in the pursuit of the Big Goal. This person will be certified by the pastoral services offices.
- *Facilities Manager*: All families and parishes must have a designated facilities manager who reports to the pastor and oversees site maintenance. This person will be a certified by the archdiocesan finance office.
- *Business Manager/Bookkeeper*: All Single Pastor Families must have a single office for bookkeeping and business services. This person will be a certified by the archdiocesan finance office.
 - Each Family of Parishes must designate one staff member who will perform HR responsibilities, e.g., administering basic employment law regarding the I-9, FMLA, ADA, and FLSA compliance. That person must be certified by the archdiocesan Human Resources Office.
 - Each Family of Parishes must designate one staff member who will perform IT responsibilities. That person must be certified by the archdiocesan Information Technology Office.

2. Optional Parish/Family Staff or Volunteers:

- *Parish Life Coordinator (PLC)*: appointed by the archbishop and acts as a delegate of the pastor in all pastoral and administrative matters not reserved to the pastor. The process for appointing Parish Life Coordinators is under development.
- *Executive Director for Schools*: As needed, families or parishes with multiple schools may designate an Educational or Executive Director who will assist the pastor in interfacing with schools and the archdiocesan Catholic Schools Office (CSO). This person's credentials will be reviewed and approved by the CSO. Depending on the needs of the parish or Family of Parishes, the Educational or Executive Director's qualifications and role may vary:
 - Professional Educator and Administrator
 - Business Administrator and Fundraiser

Click on [Suggested Job Descriptions](#) for templates related to each of these obligatory and optional positions.

3. Centralize/merge to one Business Office (required for Governance Models 1 and 2).

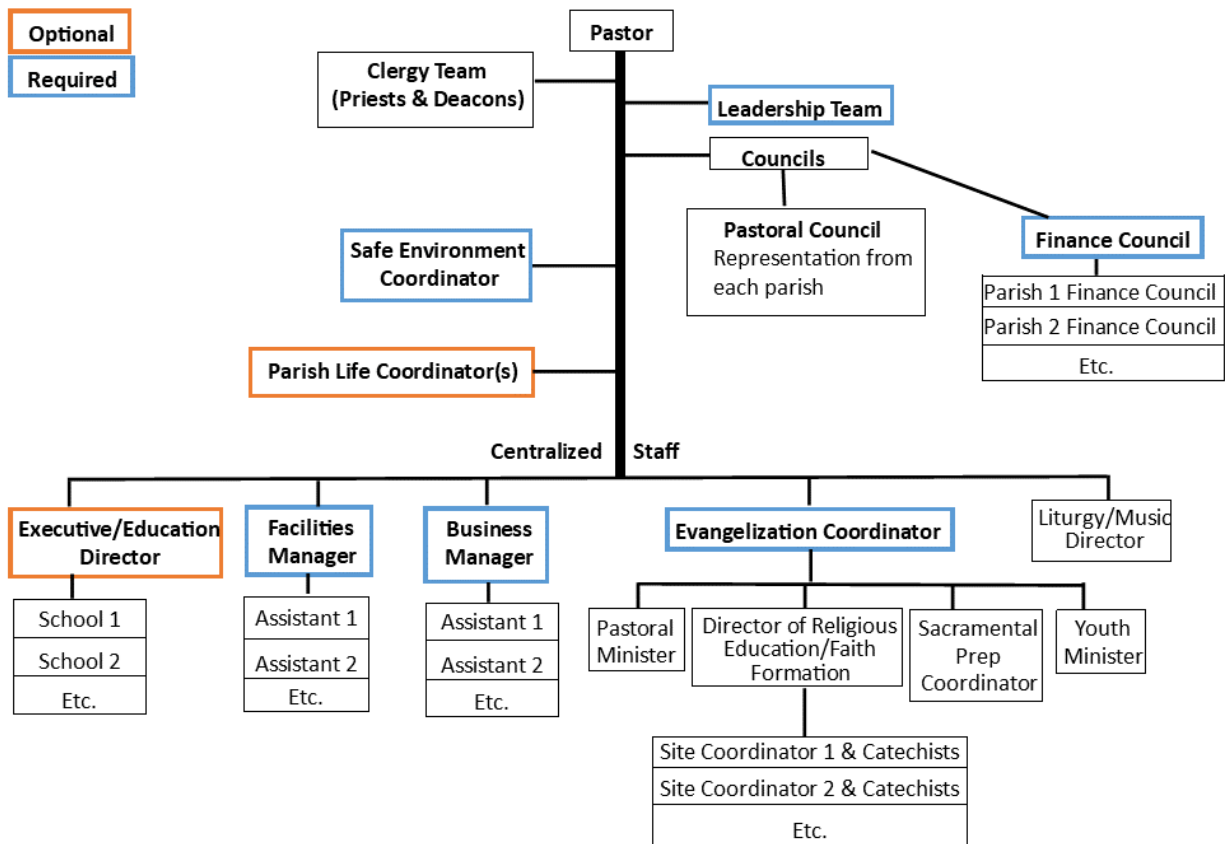
Centralization into a single Business Office for bookkeeping and business services increases efficiency and collaboration. This should ideally be located near the pastor's residence and is where he spends the majority of his administrative time. The books of all parishes should be administered here by a single Business Manager. This office can have other help such as a PT/FT bookkeeper. The archdiocesan finance office can assist with merging of QuickBooks or simply making the books common. This same Business Office would also usually include centralized human resources, facilities management, and leadership staff, e.g., Family Evangelization Coordinator, Family Executive Director for Schools.

4. Centralize/merge into a common benefits structure (recommended). This includes health insurance and other benefits such as life, disability, and Accidental Death and Dismemberment

(AD&D) insurance. The parish should be paying the same benefits amount for all full-time (30+ hour) employees.³ This will require negotiation, cooperation and compromise.

- Determine facilities usage and take action (required).** If a building such as a church hall or a school is no longer being used, take steps such as weatherizing to protect against costly and troublesome accidents. Also consider reducing property insurance coverage to demolition value to reduce the premiums.

Figure 2. Sample Organizational Chart: Single Pastor Family of Parishes



6. Staffing Considerations: Managing the Transition to a New Staffing Reality. Implementation of a new Family Model, e.g., Family Models One and Two, may result in **position redundancy**. When this occurs, great care should be taken to implement a process that treats staff with fairness, care, and dignity. A recommended step-by-step process for how to do this follows:

Identify the specific positions needed for your new staffing model. This involves:

- Determining which jobs will be part of the new family model.
 - Which are full-time paid positions? Part-time paid positions?
 - Which will be filled with volunteers?
 - Which are most critical to fill first?
 - Which jobs are no longer needed?

³ Maintaining two schools with different health insurance contributions is an example of a situation to avoid.

- Creating job descriptions for each staff and volunteer position (strongly recommended).
 - Clearly articulate the primary responsibilities, knowledge, skills, abilities, education, and experience required and preferred.⁴
 - *Required:* Classify the job correctly under the Fair Labor Standards Act (FLSA). The FLSA applies to positions filled by a paid employee, but not to volunteers or independent contractors. FLSA is a federally regulated law requiring proper attention.⁵
 - Determine the pay range for the position.
- Once the staffing model is finalized, the next step is to **evaluate the current staff and map each person to a job based on their qualifications**. Some staff may not be mapped to a job in the new staffing model, while other staff may be qualified to perform multiple jobs. This step will require you to speak with each person to confirm their background, interests, and preferences:
 - Identify each person’s knowledge, skills, abilities, experience, and education.
 - Understand each person’s preference for full-time or part-time hours.
 - Understand each person’s interests and desires related to the available positions.
 - Map each person to the job(s) he/she is qualified to perform.
- With staff mapping complete, **addressing gaps** in the staffing model is the next important step. In this step you will:
 - Identify staff who are not mapped to any job.
 - Identify jobs without a qualified person mapped to them.
 - Identify staff who are mapped to a job they can perform but are not fully equipped to do so.
- Often, the most difficult step in this process is to determine actions needed to **fill the gaps**. This step is where you will determine which staff will have his/her employment impacted either by changes to his/her job or elimination of his/her employment.
 - For **staff who are not mapped to a job** because they do not qualify for any available job, employment will need to end. Severance may be provided but is not required. Sufficient notice should be given or pay in lieu of notice provided.
 - When **a job does not have a qualified person mapped** to it, filling the role with an external candidate will be necessary.
 - For **staff mapped to one or more jobs**, you will need to:
 - Offer the position to the individual. If they accept, create a training plan to close any knowledge gap that exists.
 - If they are not interested in the role(s) offered and it is not your desire to keep them in the current role, they will effectively be resigning. Severance may be offered but is not required.
 - If they are not interested in the role(s) and can stay in their current role, the new role will need to be advertised if no other staff are able to fill the vacancy.
- After the gaps have been filled, **communicating the new staffing model** to others will be the last step in this process. Consider **who** the stakeholders are, **what** they need to know, **when** they need to know it, and **how** to best communicate, e.g., via email, in person, and/or bulletin announcement.

⁴ Click on [How to Create a Job Description](#) for further guidance.

⁵ Click on [Fair Labor Standards Act \(FLSA\) Guide](#) for further guidance.

TOPIC 6 – IT REQUIREMENTS AND RECOMMENDATIONS

See **Appendix B** for a description of each step.

Required Steps	Recommended Solutions
Choose a Data Storage and Backup	<i>Microsoft SharePoint/OneDrive, Google Drive, Druva (Backup)</i>
Choose Network/Workstation Security	<i>Fortinet Firewall with IPS, AV, content/port/application/IP filtering, Carbon Black EDR, device OS firewall, OS updates installed automatically</i>
Choose a Parish Management Solution	<i>Ministry Platform, ParishSoft or another solution that exports or provides necessary data to the Data Support Office</i>
Verify your IT systems comply with the minimum standards outlined in the 2022 Archdiocese of Omaha – <i>Information Technology Standards – Cyber Security</i>	Click on Cyber Security Resource Document for details.

Recommended Steps	Recommended Solutions
Choose a Cloud Based Phone System	<i>Webex Calling, Microsoft Teams Phone, Zoom Phone</i>
Choose a User Identity Management	<i>Azure Active Directory through the Archdiocese (archomaha.org), Azure Active Directory, Google Workspace</i>
Choose a Network Infrastructure & Wi-Fi	<i>Aruba 2930M switches (Gigabit, POE 802.3bt , Layer 3), Aruba 500 or 510 APs</i>
Choose a Web Conferencing Solution	<i>Microsoft Teams, Zoom, Webex</i>
Adjust SAAS Services to meet future needs	
Verify Email Accounts used are parish accounts and not personal accounts	
Determine age of current IT equipment and budget accordingly based on lifecycle replacement	Click on IT Hardware Standards Resource Document for details.
Review Leases, Service/Support Agreements	
Review IT Policies	<i>Data retention, incident response plan, sensitive information security and storage, device lifecycles</i>

Optional Steps	Recommended Products
Website(s)	<i>WordPress on WP Engine.com</i>
Choose a Security Camera Video	<i>Milestone XProtect Cloud, Mangocam, Genetec Omnicast</i>

TOPIC 7 – SAFE ENVIRONMENT (SE)

1. Notify Cathi Snyder in the Victim Outreach and Prevention (VOP) Office of the appointed SE coordinator(s). If at all possible, it is recommended that a single SE coordinator manage and consolidate reporting from SE coordinators at various sites. The SE coordinator will assist with:

- The required SE certification of all adult employee and volunteers who, in the name of the Church, have any contact with minors/vulnerable adults.
- The Circle of Grace yearly mandate to be taught to all minors (K-12). This includes those who are in Catholic schools or participate in religious education, family faith formation, youth ministry, discipleship groups.
- Encouraging establishment of a system to monitor the compliance of required SE certifications, policies, and code of conduct.
- Submission of the mandated yearly SE data report to the VOP office by April 15th.
- Contacting the VOP office with any concerns /violations of SE policies or code of conduct.

2. Contact the director of Victim Outreach and Prevention with any questions or needs. We are here to support you!

TOPIC 8 – SCHOOLS

Of the educational programs available to the Catholic community, Catholic schools afford the fullest and best opportunity to realize the threefold purpose of Christian education among the children and young people--to teach doctrine, to build community, and to serve. Schools naturally enjoy educational advantages which other programs either cannot offer or can offer only with great difficulty. A school has a greater claim on the time and loyalty of students and their families (*To Teach As Jesus Did, 101*).

Catholic schools formed under the authority of a single parish and pastor are considered an extension of that parish and the greater mission of the Church. The entire school and parish community must work together to ensure the educational mission is carried out effectively. The parish and school community will be most fruitful if it works in unison for the flourishing of both the parish and the school.

Important Considerations for Schools within a Parish Family.

- All parish and school staff have clarity on the mission of the school as an extension of the mission of the parish and the church. Shared messaging, shared commitment, a mutual trust and respect between the parish offices and the school offices must be evident.
 - This should lead to monthly or bi-weekly leadership meetings between the school and parish leadership team.
- Schools within the same parish family should adopt and follow the same calendar to allow for the sharing of priests for school Masses and the sharing of teaching staff between the schools (if needed).
- Schools who are working closely together to share resources (personnel, financial and instructional) would benefit from having the same salary schedule, and same tuition rate for families.
- Schools within the same parish family would benefit from the use of shared educational operational processes such as instructional strategies, common curriculum materials, teacher evaluation expectations.
- If there is a desire within the parish family for the school to shift from an Advisory Board to a Board of Limited Jurisdiction, the leadership of the parish and the school should contact the Superintendent of Schools for information about how to set up a new board structure. For details, click on [School Governance and Finance Models](#) and the [Board Handbook Template](#).
- If there is a desire within the parish family to merge the schools together, the leadership of the parish and the school should contact the Superintendent of Schools for details on the formal processes required by the Nebraska Department of Education. For details, click on [School Governance and Finance Models](#).

For any questions about the legal operation of the school and/or requirements about staffing of the school with certified personnel please contact the Superintendent of Schools, Vickie Kauffold.

Appendix A: Family Leadership Team

1. Steps for Forming a Family Leadership Team

- Pray: Ask the Lord who He would like you to invite. The team should include 4-6 people, including the pastor, and exists to help the pastor coordinate and execute the vision.
- Invite: Make personal invitations to individuals you would like to be on the team. Explain what a leadership team is, the commitment and responsibilities of leadership team members, and why you would specifically like him or her to be a part of it.
- Meet: Determine a regular weekly time to meet. Initial meetings should focus on building trust, establishing a culture of prayer, and orienting the team members to their role.
- Consolidation: If any parishes in the family have previously had leadership teams, those teams will need to be dissolved and a new team created. Representation from all parishes should be considered, however, a family leadership team is not designed to be a representative body.

2. Team Member Characteristics

- Time commitment: Must be available for weekly meetings as a whole group.
- Teachable: Must have a willingness to learn and grow. May also need to do some outside study.
- Team players: Must be able to see their area(s) of responsibility in light of the entire parish. Possible members are the evangelization coordinator, school principal, and associate pastor(s).
- Self-awareness and maturity: Emotional and spiritual maturity allows team members to engage in healthy conflict and vulnerability to a greater degree.

3. Important Criteria for a Team

- Unanimity of vision: Must be committed to pastor's vision of where he wants parish to go.
- Disagreement should be based on how to get to the vision rather than on the vision itself.
- Consider key staff and parishioners who are capable of having strategic conversations and can carry the vision to others.
- Healthy conflict and trust: Trust allows team members the freedom to express different opinions, engage in conflict, and hold one another accountable. It also allows other team members to challenge the pastor.
- Balance of strengths: Choose team members who bring natural strengths that balance pastor weaknesses. Tools like *Working Genius* and Gallup's *Clifton Strengths Finder* can be helpful.
- Vulnerability: Team members must be honest with each other about their fears, especially in the face of uncertainty as they begin to navigate uncharted waters.

4. Suggested Agenda for Family Leadership Team

- Opening prayer, with scripture and time for reflection
- Updates on current objectives, including follow-up tasks from previous meetings
- Discussion of new initiatives/concerns
- Assignment of follow-up responsibilities, tasks, and timelines, including communication to clergy, parish leaders and parishioners
- Define and share prayer intentions
- Closing prayer

Appendix B: Explanation of IT Requirements and Recommendations

1. Data Storage and Backup (Required)

- a. Choose a Cloud based storage provider that supports:
 - User authentication based on Azure Active Directory, Google Workspace and incorporating MFA
 - File versioning, Audit logging, 3rd party backup support, offline file support, robust OS accessibility, multi-region data redundancy
 - **Recommended Products:** *Microsoft Sharepoint/OneDrive, Google Drive, Druva (Backup)*
- b. Verify all parish related data is being stored in parish owned and approved locations that are secured and backed up. Choose a Cloud based backup provider that provides immutable backups, access protection by MFA and transmits and stores data encrypted.

- 2. Network/Workstation Security (Required).** The area of IT security is incredibly wide; the below items are only a part of what is needed when it comes to network and local device security. Services numbers 1, 3, and 4 should be cloud managed and updates should be applied automatically. **Recommended Products:** *Fortinet Firewall with IPS, AV, content/port/application/IP filtering, Carbon Black EDR, device OS firewall, OS updates installed automatically.*

- 3. Parish Management Solution (Required).** Choose a Cloud based Parish Management Solution that will support your parishes' operational requirements and is able to export or provide the necessary data to the Data Support Office. **Recommended Products:** *Ministry Platform, Parishsoft.*

- 4. Cloud Based Phone System (Recommended).** Choose a Cloud based phone system and service that supports:
- a. Traditional physical equipment such as handsets, ATA (fax) devices, etc.
 - b. Multiple locations under one main configuration profile
 - c. User authentication based on Azure Active Directory, Google Workspace and incorporating MFA as relevant to endpoint
 - d. Integration with meeting and conferencing services, e.g., Zoom or Webex
 - e. Soft phones for iOS, Android mobile devices
 - f. Soft phone headsets for Windows and Mac computers
 - g. Voice mail to email with optional automated transcription
 - h. Ability to forward calls to external phone numbers
 - i. **Recommended Products:** *Webex Calling, Microsoft Teams Phone, Zoom Phone*

- 5. User Identity Management (Recommended).** Choose a Cloud or hybrid user identity management solution that allows for a robust security policy (such as MFA, geofencing and risk-based account monitoring) and SAML 2.0 SSO authentication by other SAAS solutions, allowing users to have a single set of login credentials that are used across all the parishes services. **Recommended Products:** *Azure Active Directory through the Archdiocese (archomaha.org), Azure Active Directory, Google Workspace.*

- 6. Network Infrastructure and Wi-Fi (Recommended).** Devices that provide the network infrastructure should be determined based on the needs of the parish and be provided with security updates for the duration of the time they are in production. **Recommended Products:** *Aruba 2930M switches (Gigabit, POE 802.3bt , Layer 3), Aruba 500 or 510 Aps.*

7. **Web Conferencing and Collaboration (Recommended).** Solutions should support:
 - a. User authentication based on Azure active directory, Google Workspace or incorporating MFA
 - b. Robust integration with Azure Active Directory or Google Office
 - c. Safe Environment requirements
 - d. *Recommended Products: Microsoft Teams, Zoom, Webex*
8. **IT Security Training (Recommended).** Choose a Cloud based cyber security awareness training program for priests, employees, and volunteers who use computers, mobile devices or services at your locations. If your staff have @archomaha.org accounts they are currently included in the Archdiocese IT security training services. *Recommended Products: KnowBe4.*
9. **SAAS Services (Recommended).** Review current SAAS providers such as Office 365, parish management, etc. that are used and adjust the licensing and features to meet your future needs.
10. **Email Accounts (Recommended).** Review the email accounts that are used by staff, services and devices and verify they are using accounts that belong to the parish rather than personal accounts such as @gmail.com or @hotmail.com.
11. **Budgeting and Device Lifecycle Replacement (LCR) (Recommended).** Determine age of current IT equipment and budget accordingly based LCR. If network equipment such as firewalls, switches, access points and routers are no longer provided with security updates by the manufacture they should be replaced.
12. **Leases, Service/Support Agreements (Recommended).** Review current agreements for items/services such as copiers, printers, Internet, telephony, and managed services providers.
13. **IT Policies (Recommended).** Review and update IT related policies such as data retention, incident response plan, sensitive information security and storage, device lifecycles.
14. **Website(s) (Optional)**
 - a. Hosting can be provided at no charge through WPEngine.com under the Archdiocese virtual environment; the site must be WordPress based
 - b. 3rd party hosting services should be provided by a reliable service that will not interject adds/collect/distribute visitor information to pay for hosting services
 - c. Hosting services should automatically patch/update/backup all sites and maintain security best practices
 - d. Design, content and functionality recommendations can be provided by the Archdiocese Communications Office
 - e. *Recommended Products: WordPress on WPEngine.com*
15. **Security Camera Video (Optional).** Choose a Cloud based or hybrid video management solution that will allow you to consolidate and manage security camera and video to a single solution. *Recommended Products: Milestone XProtect Cloud, Mangocam, Genetec Omnicast.*

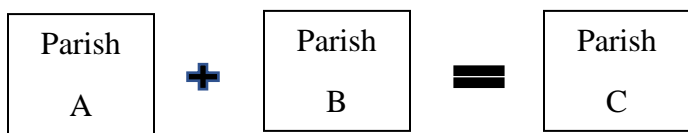
Appendix C: Guidelines for Merging Parishes

A parish is a community of the faithful, which is usually grouped according to where people live. A parish is distinct from the church building. Merging of parishes is the combination of all people, assets, and liabilities into one parish. A merger does not affect the status of the church building.

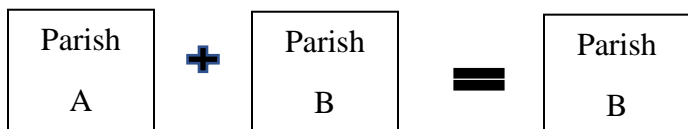
Parish ≠ Church Building

Two Ways of Merging

1. **Extinctive Union:** Two or more parishes combine to create one new parish. The old parishes cease to exist (e.g., A and B). Only the new parish remains (e.g., C).



2. **Amalgamation:** One or more parishes (e.g., A), are subsumed into another parish (e.g., B). This usually occurs with small parishes being subsumed into a larger parish.



Journey of Faith Financial Guidelines. After a merger occurs:

1. Required: Sunday-giving envelopes should have the resulting merged parish's name on them and not the church location's name, e.g., for the extinctive union example above, the envelopes would be marked Parish C, and for the amalgamation example they would be marked Parish B.
2. Required: All past and future non-specified donations are to go into an unrestricted pool of funds for the needs of all locations. This should happen once the civil corporation change has occurred.
3. Recommended: Pastors should discourage site specific restricted donations.

Steps for Merging. The process can take about a year to complete, and unfolds in 12 sequential steps:

1. Support of all involved pastors for the proposed merger.
2. One of the pastors reach out to Chancellor, Deacon McNeil, or Vice Chancellor, Elizabeth Sondag to discuss details of the proposed merger.
3. Support of Family Pastoral Planning Team (if it still exists), Leadership Team, Finance Councils, and Parish Council(s) of all involved parishes for the proposed merger.
4. Get feedback from parishioners of each parish involved in possible merger. If the vast majority of parishioners are supportive of merger, then move to next step.
5. Pastor(s) write Archbishop Lucas asking for merger.
6. Archbishop Lucas schedules merger to be presented to the Priests' Council.

7. Archbishop presents the merger to the Priests' Council. Each parish involved must be presented separately.
8. Merger decreed and announced. Archbishop Lucas decides if merger should occur or not. If he approves, the decree is written and announced in bulletins.
9. Appeal time. 10 days for parishioners to appeal merger.
10. Merger occurs. If there is no appeal, merger canonically goes into effect.
11. Civil Incorporation. Pastor works with Pat Flood on the civil corporation changes. This is paid for by the archdiocese.
12. Finances. Pastor works with the archdiocesan finance department on needed financial changes

Appendix D: Cessation of Sunday Mass: Church Building Requirements

- 1. Definition of Parish Church.**⁶ The principal church⁷ of a parish, which is bound by certain requirements as explained below.
 - a. Must have the Eucharist reserved, according to the requirements in point 2 below.⁸
 - If there is no Sunday Mass at a church, the pastor can request a dispensation from this requirement from the archbishop.
 - b. Are to be available for baptisms,⁹ weddings¹⁰, and funerals¹¹ of parishioners.
 - c. Are to celebrate the church's titular feast and the anniversary of dedication (if applicable).¹²
 - d. Are to have the cleanliness and beauty preserved as befitting a house of God.¹³
 - e. Are to be protected, such that the goods of the church do not perish or suffer damage.¹⁴

- 2. When a church has the Eucharist reserved, it is to:**
 - a. be open a few hours every day to the faithful unless there is a grave reason to the contrary.¹⁵ An example of a grave reason is a need for security.
 - b. have Mass at least twice a month as far as possible.¹⁶
 - c. have an annual solemn exposition of the Most Blessed Sacrament for an appropriate time, even if not continuous, so that the local community more profoundly meditates on and adores the eucharistic mystery (recommended).¹⁷

- 3. When a church does NOT have the Eucharist reserved:**
 - a. the church must be open for divine worship at times.¹⁸ It may be open rarely.¹⁹
 - b. it is up to the discretion of the pastor to direct the frequency and form of exercise of divine worship in the church.²⁰ This is to be according to the parameters of pastoral planning.

⁶ All churches in the Archdiocese of Omaha are currently parish churches, even those commonly known as mission churches.

⁷ Definition of Church: A sacred building intended for divine worship, to which the faithful have right of access for the exercise, especially the public exercise, of divine worship (*Code of Canon Law*, Canon 1214).

⁸ Canon 934

⁹ Canon 857 §2

¹⁰ Canon 1115

¹¹ Canon 1177

¹² Jurisprudence of the Dicastery for the Clergy

¹³ Canon 1220

¹⁴ Canon 1284

¹⁵ Canon 937

¹⁶ Canon 934

¹⁷ Canon 942

¹⁸ Canon 1214

¹⁹ Jurisprudence of the Apostolic Signatura

²⁰ *Ibid.*

- 4. Catholic Mutual Group Insurance:** For coverage to extend property that is vacant or unoccupied for more than 60 days, a manuscript endorsement must be added to the certificate listing that property. There would be no change to the rate for the property unless the coverage basis is changed. **It is recommended to move to “Demolition Value” for any property that is no longer having Sunday Mass, which will significantly reduce the premium.** The pastor would need to reach out to Catholic Mutual on the coverage requested. Jim Stolze from the archdiocesan finance office is available for assistance. For details, click on [Procedures for Vacant and Unoccupied Buildings](#).
- 5. Permanently Closing a Church Building**
- a. For a diocesan bishop to close a church, he must relegate it to profane but not sordid use in accordance with canon law.²¹
 - b. A pastor should consider having a conversation with the Chancellor or Vice Chancellor about permanently closing a church when one or more of the following conditions exist:
 - Keeping the church open is not financially viable.
 - Keeping the church open is an impediment to priestly flourishing.
 - There are about 15 or less church-going parishioners.
 - There is no strong opposition to the closure.
- 6. Sale of Property and Demolition:** The following are requirements for the sale of property or the demolition of a parish building worth over \$25,000 or 10% of the prior year's ordinary annual income, whichever is higher.²²
- a. The church must first be relegated to profane but not sordid use unless it is going to be used for Catholic worship.
 - b. Financial appraisal of the parish building being sold or demolished.
 - c. Financial appraisal of any land being sold.
 - d. Disclosure of any previous parish land sales.
 - e. Permission of the diocesan bishop along with the consent of the diocesan finance council, college of consultors, and interested parties.
 - f. A just cause for the sale or demolition.
 - g. If the total amount exceeds \$3,500,000.00, permission from the Dicastery for the Clergy is also needed.
 - h. The sale ordinarily must not be for a price less than that indicated in the appraisal.
 - i. The parish receives the money from the sale.
 - j. The parish pays any closing costs and demolition costs.
 - k. Jim Stolze from the archdiocesan finance office can help with this process.

²¹ Canon 1222

²² Canons 1291-1294